

## 1.0 Transportation Focus Team for TIPS

**Scope:** To determine and prioritize functional requirements for transportation under the Total Integrated Procurement System (TIPS) Also to accomplish the following:

- Validate current documentation
- Prioritize functional requirements
- Consider and recommend interfaces (including sample screens)
- Identify management issues & decisions (make recommendations).

**Team Members:** Ruby Alexander, Jim Bergauer, Elsie Loibl, Marcella Mathieson, and Pat Myers

### Overview of Transportation:

**Purpose:** Improved value and utility of system is needed for our:

- 1) requesters,
- 2) suppliers,
- 3) BUS employees involved in procurement process, and
- 4) other systems that rely on data from procurement system

### Primary Requirements

#### Desirable Attributes of TIPS System

- Online (everyone can access and use easily)
- Expert (system would “walk” user through the system)
- Feedback (summary of PR and attachments and a place to make necessary changes)
- Distribution (electronic routing and approvals)
- Final Report (after PR placement, summary of order sent to requester)

#### Functional Requirements Requested

- Online Shipping Request Available through TIPS
- Online Electronic Carrier Determination through TIPS

### Interfaces

### Management Issues:

**Other Issues:**

Consider Existing Transportation Technology:

- Automated Transportation Management System (ATMS)
- Online Shipping Request Forms Available on the Web
- BUS-4 Quote Database (In Access)

**The functional requirements are described in detail below:**Functional Requirements for an On-line Shipping Request

(Listed in Order of Priority)

1. Request that the Shipping Request be accessible via the TIPS Main Menu instead of the requester filling out a blank electronic form, the system would prompt them to answer a series of questions. Based on the requester's response to these questions, the system would lead them to the appropriate screens and would generate a Shipping Request unique to their particular shipment (whether it be a document, a hazardous commodity, a classified commodity, etc.)
2. Request automatic validation of Cost Center, Program Code, Cost Account, and Work Package field combinations on the Shipping Request
3. Request electronic routing of Shipping Request to appropriate parties
  - property core, procurement, etc.
  - request that when Shipping Request leaves one address, an electronic message is sent back to the requester notifying them of the action
4. Request electronic database look-ups
  - PAIRS (when requester enters prop# on the Shipping Request, a database lookup to PAIRS would allow for the model #, serial #, item value, and nomenclature to be populated automatically)
  - TIPS (since the Shipping Request would be in TIPS, request that when requester enters their name or Z# on Shipping Request form that a database look-up in TIPS occur (requester profile) that would populate the Group, Mail Stop, Phone Number, Fax Number, Cost Center, Program Code, Cost Account, and Work Package fields on the Shipping Request) **Note:** On the existing On-Line Shipping Request Form on the WEB, this information is looked up in the EDS System.

5. Request a final notification report to requester advising them that shipment has been made (including details about the shipment)
6. At the time Shipping Request is received by Shipping, request this information populate the Automated Transportation Management System (ATMS) and the Federal Express Powership System (if applicable), so that the information for the Bill of Lading and Federal Express shipments does not need to be re-keyed. (Real-time not batch process).

## **Functional Requirements for On-line Rating & Carrier Determination in TIPS**

1. Request that carrier rate information be accessible to users via TIPS Main Menu
  - Since this carrier cost information already exists in Automated Transportation Management System (ATMS), request that this data be shared with TIPS so that requester need not toggle between TIPS and ATMS.
  - By having this option available on TIPS main menu, it will allow for all LANL users to access LANL carrier rate information (Procurement, Shipping, Credit Card Holders, etc.)
  - The person requesting rate information would simply need to enter some basic information about the shipment (origin and destination zip codes, weight, dimensions, if applicable). Based on this information, the system would specify the best-cost carriers along with their phone numbers and the rate for the shipment.
  - In addition to existing ATMS information, request that there be an initial screen in the Carrier Rate/Route option that would ask the requester a number of questions about their shipment (via pull-down menus). If the answers provided by the requester indicated that the shipment requires any of the following, a specialized routing request will be sent electronically to the Shipping Office so that they can determine the best carrier for the shipment.
    - Shipment is oversize
    - Shipment is valued at more than \$20K
    - Shipment is fragile
    - Shipment weighs more than 10,000 lb.
    - Shipment contains hazardous materials
    - Shipment is perishable

We request that TIPS have the capability to access zipcode look-ups and package tracer information (Federal Express) already available on the WEB

2. Provide an on-line justification area that must be filled out if other than the most cost-effective carrier is selected. This is required per DOE Order. Would suggest that the justification not be necessary if the additional freight charges were within a set tolerance (\$5). A good example of this may be when deciding whether to ship via UPS or FedEx. Although UPS freight rates are typically lower, LANL has to go through many other administrative processes to ship inbound via UPS (the freight must be prepaid and add), therefore the administrative costs usually outweigh the differences in freight rates

3. Request that qualitative carrier data be fed into the TIPS Rating/Routing Section
  - these qualitative tables would be maintained by BUS-4 Transportation
  - these qualitative tables would allow LANL to rank a carrier not only on cost information but also on service information. Some qualitative data exists on ATMS, but it is not inclusive enough (does not include qualitative data on air or parcel carriers--only on less-than-truckload carriers).

The qualitative ranks that do exist in ATMS for less-than-truckload carriers are:

- billing performance,
- claims performance,
- financial stability,
- local representation,
- tracing ability, and
- transit times.

Request that a table be set up that references the carrier's minimum liability amounts, their average transit times, etc.

## Functional Requirements

### Other Transportation Requirements in TIPS

- Ensure that Hazmat packaging procurements get appropriate pre-approvals by BUS-4 prior to order
- Ensure that Hazmat packaging procurements get appropriate post-approvals of material upon receipt